HOW TO PREPARE A BULK ACHIEVEMENT/GRANT CLAIM FILE

Our bulk upload function has been provided to enable data already held in your own systems to be quickly and easily exported for upload to the Construction Training Register. The CSV schema document provides your systems administrators with the technical specification for the CSV file format and details which fields should be provided. This document describes in more detail how you can use this file to upload bulk achievements and grant claims.

CITB Levy Registered Employers

An employer can use the bulk CSV file template to submit manual claims for Short Duration achievements awarded after 1 April 2018 only. If your claim is for a Short Duration course completed before 1 April 2018, please visit www.citb.co.uk/grant for guidance on how to submit your claim.

Approved Training Organisations

An ATO can use the bulk CSV file template to submit achievements awarded after 1 April 2018 to CITB.

Bulk Upload or Individual Claims?

Bulk Uploads are expected to be based on data exported from another source (such as your HR system or your Learner Management System). We do not recommend that you manually create files for submission via this method as this is open to input error and formatting issues. If you are keying in data, we strongly recommend that you use the Submit Individual Claim page which features measures to ensure your submissions are valid and to give you instant feedback on any entry errors.

Using Excel

Although a popular and easy way to view CSV files, Microsoft Excel can cause problems when creating or editing files for import to the Construction Training Register. Excel is often the default program used to open CSV files, so regardless of how you create your submission, please be aware that if you view or edit and then save a CSV file in Excel it is likely to invalidate the file for upload purposes. If you want to review or make minor changes to a CSV file before uploading it, we recommend you use a simple text editor such as Notepad, a dedicated CSV authoring programme or an Excel alternative with support for CSV creation with quote and comma delimitation.

Excel Template

If you do decide to use Excel we recommend you use the Excel template we provide. This includes some basic validation to make sure the information you enter meets the criteria we require and that when it is exported it uses the formats the Construction Training Register can accept. We recommend you keep a copy of both the spreadsheet and the exported CSV, as if you need to make changes you will need to update the Excel version and re-export. It's safe to view the file in Excel, but if you save or make changes to it this way it will fail to import. When you click export you will have the opportunity to specify a file name and location, which will initially set to your default file location within Excel (often My Documents).

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Preparing the CSV file

- We advise you download this guidance and any templates you need each time you want to add achievements/claims to ensure you are using the most up-to-date specification.
- Please ensure all columns are present in your file and that all mandatory fields have been populated and as many optional fields as possible for each Short Duration achievement that you wish to submit.
- Details of the information required for each column are provided in the table below. You should read these before submitting the file and always ensure you are following the latest format and guidance available online.
- There are a number of columns marked either Leave Blank or optional fields which are no longer required, these must be included although no data is required. These have been hidden in the template and are highlighted in grey in the table below.
- The first row in your file will be assumed to contain headers and will be ignored.   We recommend you use the labels used below. Please be aware that if you do not include a header row your first entry will not import and will be lost
- **It is very important that the file is checked for compliance to these guidelines before upload.   Files that do not meet these criteria will fail to upload and provision of incorrect data could invalidate grant claims.**
- If you need further support with individual columns in the spreadsheet then please see the table below.

Once you have checked the file; please follow these steps:

1. Click the Export button to export in CSV format and make a note of the save location and file name.
2. Go to the "Submit Bulk Achievement" page in your ATO menu and click on the 'Upload a new bulk achievement' button. Click 'Browse' to find the file and then 'Submit' to submit your achievement claims.
3. You will receive feedback onscreen once the file has loaded letting you know whether the file has been uploaded successfully. This usually takes no longer than a few minutes, but may vary due to the size of your file and the number of users online at the time.
4. If the file has had some failures then you can see the details of these failures under the exception details. You can download these exceptions by clicking on the "Download Exception Details".
5. You then have the option to download these failed records, amend them and export them into a new CSV file to start the uploading process again (Steps 1-3). You will find any failed records available for download under the "Rejected Files".

HOW TO PREPARE A BULK ACHIEVEMENT/GRANT CLAIM FILE

Column	Value	Mandatory?	Information required
1	**Training Provider**	**YES**	**ATO** –The name of your business, as it appears on the Training Directory **Employer** – The name of the Training Provider who has awarded your Short Duration achievement (the provider who delivered and certificated the training)
2	**Course Code**	**YES**	The course code (the unique reference number for the course completed by the learner/trainee) This can be found within the list of approved courses published by CITB. Please visit www.citb.co.uk/grants for this information.
3	**CITB Levy Registration Number**	**NO**	7 digit CITB Levy and Grant registration number e.g. 1234567. This should be the registration number of the employer who has paid for the training and is making the claim for grant payment. **Employers** please note your grant claim cannot be paid if this number is not completed.
4	**Achievement Award Date**	**YES**	Date of the achievement in the format DD/MM/YYYY. This is the date that the training was completed and assessment passed.
5	**Achievement Expiry Date**	NO	LEAVE THIS COLUMN BLANK BUT DO NOT DELETE.
6	**Leave Blank 2**	NO	LEAVE THIS COLUMN BLANK BUT DO NOT DELETE – reserved for future use
7	**Leave Blank 3**	NO	LEAVE THIS COLUMN BLANK BUT DO NOT DELETE – reserved for future use
8	**Unique Learner Number**	NO	Unique Learner Number (ULN) is a 10-digit reference number which is used alongside and to access the Personal Learning Record of anyone over the age of 13 involved in UK education or training.
AT LEAST ONE OF THE FOLLOWING TWO COLUMNS MUST BE POPULATED. PLEASE NOTE: BOTH CAN BE POPULATED			
9	**Phoenix ID**	**YES** ONE OF THESE COLUMNS MUST BE	A seven-digit number which can be found on the learners CSCS card or on other paperwork issued by CITB such as Site Safety Plus certificates or CPCS cards.

HOW TO PREPARE A BULK ACHIEVEMENT/GRANT CLAIM FILE

Column	Value	Mandatory?	Information required
10	**National Insurance Number**	POPULATED. NOTE: BOTH CAN BE POPULATED	This must be in the format "AB123456A" please do not use temporary numbers (commencing TN)
11	**National Construction ID**	NO	This is a unique number given to an individual who has a record within the Construction Training Register
12	**First Name**	YES	The forename of the learner who has completed the training.
13	**Last Name**	YES	The surname of the learner who has completed the training.
14	**Email**	NO	The work or personal email address of the learner who has completed the training. Please do not provide generic or public mailboxes.
15	**Mobile Phone**	NO	The work or personal mobile phone number of the learner who has completed the training.
16	**DOB**	YES	Date of birth of the learner in the format DD/MM/YYYY
17	**Street 1**	YES	The first line of the home address for the learner.
18	**Street 2**	NO	The second line (if applicable) of the home address for the learner.
19	**Street 3**	NO	The third line (if applicable) of the home address for the learner.
20	**City**	NO	The town or city (in applicable) for the home address for the learner.
21	**County**	NO	The County for the home address for the learner.
22	**Postcode**	YES	The postcode for the home address for the learner.
23	**Country**	NO	The County for the home address for the learner.
24	**Leave Blank**	NO	LEAVE THIS COLUMN BLANK BUT DO NOT

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Column	Value	Mandatory?	Information required
	4		DELETE – reserved for future use`
25	**Notes**	**NO**	A custom message that will appear on the grant report for employers against a record.